# NORTH CAROLINA COVID-19 RESPONSE:
# End-to-end Provider Enrollment Process

**This guide contains pertinent information to support Healthcare Provider's readiness to manage and administer the COVID-19 vaccine.**

**Who can enroll in the COVID-19 Vaccine Management System (CVMS)?**

- Eligible Healthcare Providers – who are interested in administering the COVID-19 vaccine and can self-register in the CVMS PROVIDER ENROLLMENT PORTAL

**Before getting started in CVMS, it is recommended that a representative from your organization should:**
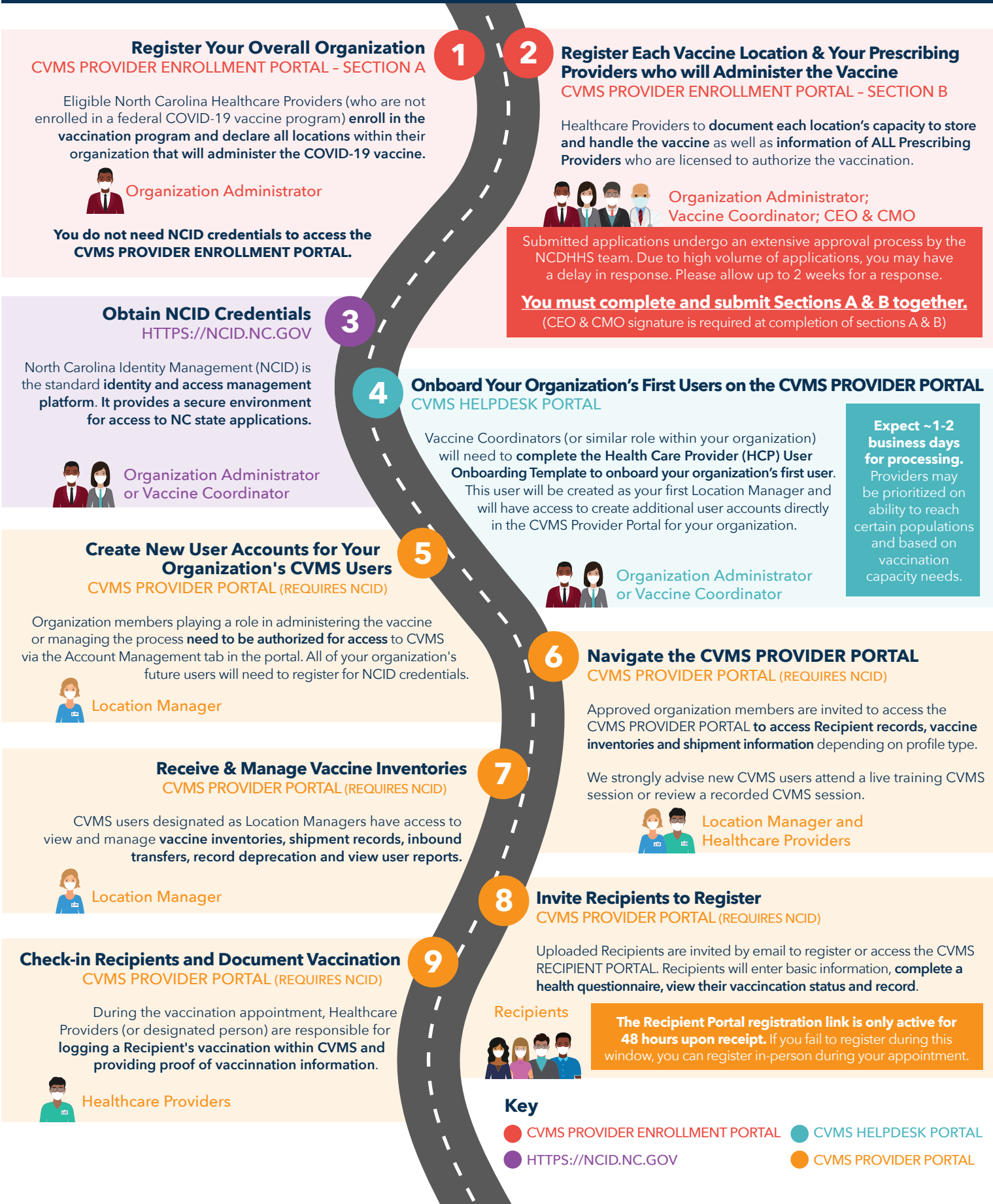
☐ Attend a live CVMS Provider Enrollment Training Session (CVMS Training Schedule)

☐ Review and complete the COVID-19 Vaccine Readiness Checklist before step 4 below

☐ Identify a single point of contact for your employees to send questions or provide feedback related to the administration COVID-19 Vaccine (FAQS)

*Enrollment can be initiated at https://covid-enroll.ncdhhs.gov

As a reminder, COVID-19 vaccine providers must be qualified under the CDC agreement to prescribe COVID-19 vaccines and authorized under the appropriate NC licensing authority. Enrolled COVID-19 vaccine providers must be credentialed/licensed in North Carolina.

Please understand that while currently qualified providers are welcome to enroll, requests will be addressed in an order aligned with the Prioritization Phases and the timeline for approval will vary. The State will continuously reassess enrollment prioritization based on needs.

# CVMS ENROLLMENT & ONBOARDING

**1 — Register Your Overall Organization**
CVMS PROVIDER ENROLLMENT PORTAL – SECTION A

Eligible North Carolina Healthcare Providers (who are not enrolled in a federal COVID-19 vaccine program) **enroll in the vaccination program and declare all locations** within their organization **that will administer the COVID-19 vaccine.**

Organization Administrator

**You do not need NCID credentials to access the CVMS PROVIDER ENROLLMENT PORTAL.**

**2 — Register Each Vaccine Location & Your Prescribing Providers who will Administer the Vaccine**
CVMS PROVIDER ENROLLMENT PORTAL – SECTION B

Healthcare Providers to **document each location's capacity to store and handle the vaccine** as well as **information of ALL Prescribing Providers** who are licensed to authorize the vaccination.

Organization Administrator; Vaccine Coordinator; CEO & CMO

Submitted applications undergo an extensive approval process by the NCDHHS team. Due to high volume of applications, you may have a delay in response. Please allow up to 2 weeks for a response.

**You must complete and submit Sections A & B together.**
(CEO & CMO signature is required at completion of sections A & B)

**3 — Obtain NCID Credentials**
HTTPS://NCID.NC.GOV

North Carolina Identity Management (NCID) is the standard **identity and access management platform**. It provides a secure environment for access to NC state applications.

Organization Administrator or Vaccine Coordinator

**4 — Onboard Your Organization's First Users on the CVMS PROVIDER PORTAL**
CVMS HELPDESK PORTAL

Vaccine Coordinators (or similar role within your organization) will need to **complete the Health Care Provider (HCP) User Onboarding Template to onboard your organization's first user**. This user will be created as your first Location Manager and will have access to create additional user accounts directly in the CVMS Provider Portal for your organization.

**Expect ~1-2 business days for processing.** Providers may be prioritized on ability to reach certain populations and based on vaccination capacity needs.

Organization Administrator or Vaccine Coordinator

**5 — Create New User Accounts for Your Organization's CVMS Users**
CVMS PROVIDER PORTAL (REQUIRES NCID)

Organization members playing a role in administering the vaccine or managing the process **need to be authorized for access** to CVMS via the Account Management tab in the portal. All of your organization's future users will need to register for NCID credentials.

Location Manager

**6 — Navigate the CVMS PROVIDER PORTAL**
CVMS PROVIDER PORTAL (REQUIRES NCID)

Approved organization members are invited to access the CVMS PROVIDER PORTAL **to access Recipient records, vaccine inventories and shipment information** depending on profile type.

We strongly advise new CVMS users attend a live training CVMS session or review a recorded CVMS session.

Location Manager and Healthcare Providers

**7 — Receive & Manage Vaccine Inventories**
CVMS PROVIDER PORTAL (REQUIRES NCID)

CVMS users designated as Location Managers have access to view and manage **vaccine inventories, shipment records, inbound transfers, record deprecation and view user reports.**

Location Manager

**8 — Invite Recipients to Register**
CVMS PROVIDER PORTAL (REQUIRES NCID)

Uploaded Recipients are invited by email to register or access the CVMS RECIPIENT PORTAL. Recipients will enter basic information, **complete a health questionnaire, view their vaccination status and record.**

Recipients

**The Recipient Portal registration link is only active for 48 hours upon receipt.** If you fail to register during this window, you can register in-person during your appointment.

**9 — Check-in Recipients and Document Vaccination**
CVMS PROVIDER PORTAL (REQUIRES NCID)

During the vaccination appointment, Healthcare Providers (or designated person) are responsible for **logging a Recipient's vaccination within CVMS and providing proof of vaccinnation information.**

Healthcare Providers

## Key

- CVMS PROVIDER ENROLLMENT PORTAL
- HTTPS://NCID.NC.GOV
- CVMS HELPDESK PORTAL
- CVMS PROVIDER PORTAL

# Step-by-Step Instructions for CVMS Enrollment

## STEP 1: Register Your Overall Organization

Organization Administrators can submit an enrollment application for the CVMS PROVIDER ENROLLMENT PORTAL in one of two ways:
1. Through an email invitation to register from a NCDHHS Immunization Coordinator
2. Initiating self-registration directly at https://covid-enroll.ncdhhs.gov/

Follow steps within the CVMS PROVIDER ENROLLMENT PORTAL to complete Section A, Organization Administrator. To complete this section you will be asked for:
- Organization details
- Organization Administrator contact details
- Location(s) administering vaccinations and their Vaccine Coordinator contact details
- Executive Officers (CEO & CMO) contact details

Once all required fields have been completed for Section A in Step 1, confirm details are correct and submit to progress to Section B, Vaccine Coordinator in Step 2 (below).

LINKS: CVMS Provider Enrollment Account Registration and Password Reset User Guide

CVMS Provider Enrollment Organization Administrator User Guide

## STEP 2: Register Each Vaccine Location & Your Prescribing Providers who will administer the vaccine

To complete Section B, the Vaccine Coordinator will receive a welcome email to register for the CVMS PROVIDER ENROLLMENT PORTAL. To complete this section you will be asked for:
- Location details
- Primary and Back-up Vaccine Coordinator contact info
- Shipment availability
- Provider type and setting
- Population(s) served
- Storage capacity and storage unit specifications
- List of Providers, including license numbers, with prescriptive authority

*For Locations with 25 or more practicing providers who will be administering the COVID-19 vaccine, you can receive support entering your providers into CVMS via the provider bulk upload process:
- Please use the Provider Bulk Upload Template and submit a ticket via the CVMS HELPDESK PORTAL
- If your location needs assistance with bulk upload, please submit Section B WITHOUT adding Providers in CVMS

Once all required fields have been completed for Section B, the Vaccine Coordinator must:
- Review and sign the Storage and Handling Attestation
- Review and sign the CDC COVID-19 Vaccination Program Provider Agreement

Upon completion of Section B, the organization's CEO and CMO will receive a welcome email to register and access the CVMS PROVIDER ENROLLMENT PORTAL to:
- Review submitted organization information
- Provide an e-signature to approve submitted organization information
- Review and sign the Storage and Handling Attestation
- Review and sign the CDC COVID-19 Vaccination Program Provider Agreement

**You must complete and submit Sections A & B together. The CEO and CMO signature is required at completion of sections A & B.**

Submitted applications undergo an extensive approval process by the NCDHHS team. You will be notified if your file has been approved, denied or requires additional information.

**Due to high volume of applications, you may have a delay in response. Please allow up to 2 weeks for a response.**

LINKS: CVMS Provider Enrollment Vaccine Coordinator User Guide

CVMS Provider Enrollment Responsible Officer User Guide

CVMS Provider Enrollment Account Maintenance User Guide

CVMS Provider Enrollment Portal Complete Storage and Handling Attestation Job Aid

## STEP 3: Obtain NCID Credentials

**All Healthcare Providers and Employees who require access to CVMS with the intention of managing the vaccine distribution process must register for NCID credentials.**

If you do not have a Business NCID, go to [https://NCID.NC.GOV](https://NCID.NC.GOV). Use the following steps to obtain your credentials and store them some place safely:
- Click register
- Select Business
- Choose a username
- Confirm email address by clicking link in the automated verification email
- Complete all required fields
- Set up security questions
- Finish & submit

Email your NCID username to your assigned Vaccine Coordinator or Organization Administrator who will onboard your organization and grant you access to the CVMS PROVIDER PORTAL. Please note there is a 24-hour approval process.

**IMPORTANT: If you are employed or responsible for two or more locations for your organization, you only need to create a SINGLE NCID login to access each of your locations.**

LINKS: [NCID Registration Link](#)

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## STEP 4: Onboard Your Organization's First User on the CVMS PROVIDER PORTAL

Vaccine Coordinators (or similar roles within your organization) will need to complete the Healthcare Provider (HCP) User Onboarding Template to onboard your organization's first user. This user will be created as your first Location Manager and will have access to create additional user accounts directly in the CVMS PROVIDER PORTAL for your organization.

To begin, download the [HCP User Onboarding Template](#) (can also be opened from the CVMS Readiness Checklist)

Save and rename the file according to the following naming convention: [Insert Organization] HCP [Insert Date].xlsx

**Instructions for filling out the** HCP User Onboarding Template:

***1. Complete Preparer Information.*** If there are issues or errors with the HCP User Onboarding Template, a member of the NCDHHS COVID-19 Vaccine Program Team will contact you. The preparer of the file will need to enter their contact information:
- Organization name
- Preparer name
- Role/Title
- Email address
- Phone number

***2. Add First Location Manager Data to HCP User Onboarding Template.***
- First name and Last name
- Email address
- NCID username
- Profile ("Healthcare Location Manager")
- Location information

The Location Manager can be associated with multiple locations, you will need to create a line item for each location. Make sure to duplicate the same user details in the first five columns for all locations.

Ensure that the First name, Last name, and Email address matches the information used to register for an NCID. Any discrepancy will delay the user from receiving system access to CVMS.

***3. Verify and Save Data to Submit File.*** Review all required HCP User Data you have entered and save the file.

While processing your HCP User Onboarding Template, the team may encounter issues or errors within the file. If the individual included in your HCP User Onboarding Template failed, you will receive an email notification from the IT Service Desk ([ncgov@servicenowservices.com](mailto:ncgov@servicenowservices.com)).

***4. Submitting the HCP User Onboarding Template.*** Create a new ticket or refer to your existing ticket on the CVMS. We have streamlined our processes for onboarding providers to CVMS and have launched a new intake form available on the [CVMS HELPDESK PORTAL](#). Please follow the below instructions:
- Visit the [CVMS HELPDESK PORTAL](#) and login with your account
- Click on the "HCP User Onboarding Template / Recipient Bulk Upload" tile to create a ticket
- Submit a case via the intake form and attach your .xlsx file(s)
- Your ticket will be automatically routed to our onboarding team for processing

**Please expect 1-2 business days for NCDHHS to process your file.**

**Once your First Location Manager has been granted system access to the CVMS PROVIDER PORTAL, they will receive a system auto-generated welcome email with instructions on how to complete account setup.**

LINKS: [HCP User Onboarding Process User Guide](#)

[HCP User Onboarding Template](#)

[CVMS HELPDESK PORTAL Form](#)

## STEP 5: Create New User Accounts for Your Organization's CVMS users

The First Location Manager will log in to the CVMS PROVIDER PORTAL using their NCID username and password.

Once on the homepage, navigate to the Account Management tab and click add "new member."

You will be required to enter the following details for each new user:
- First name and last name
- Email address
- NCID username
- Profile (Drop-down field, select either "Healthcare Provider" or "Healthcare Location Manager")

Ensure you designate the correct profile for each of your new users:
- **Healthcare providers** administer the vaccine and check in recipients
- **Location managers** are responsible for supervising vaccine inventories and uploading recipients for access to CVMS Recipient Portal

Each one of your locations must be assigned a Healthcare Location manager profile and a Healthcare Location manager can be the same user for multiple locations.

Ensure that the First name, Last name, and Email address matches the information used to register for an NCID. Any discrepancy will delay the user from receiving system access to CVMS.

After clicking save, an email will be sent to the users inviting them to sign in to their CVMS PROVIDER PORTAL accounts and start performing their applicable activities.

LINKS: Account & Organization Management User Guide

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## STEP 6: Navigate the CVMS PROVIDER Portal

Approved users will receive an automated welcome email from the CVMS PROVIDER PORTAL inviting them to log-in.

On the CVMS PROVIDER PORTAL log-in page, click the blue NCID button.

Use your NCID username and password to sign-in.

In the CVMS PROVIDER PORTAL, TABS help you navigate between pages. The TABS you see are based on your user profile, Healthcare Location Manager or Healthcare Provider.

Healthcare Location Managers tabs:
- Home
- Recipient
- Appointments
- Bulk Registration
- Vaccine Inventory
- Shipments
- More
  - Organization Management
  - Help & Information
  - Reports
  - Account Management

Healthcare Providers tabs:
- Home
- Recipients
- Appointments
- Help & Information

For users with access to multiple locations, you will need to select the location you are operating in at each login. To operate in a different location, use the 'Switch Locations' button and select the correct location.

Note: There are three (3) separate reports currently available for Healthcare Location Managers:
- HCP Healthcare Roles Report - identify all users and associated roles at the location of the logged-in user
- Inventory Summary Report - view your location(s) COVID-19 vaccine inventories
- Recipient Vaccination Report - view all recipient vaccination details of your location

LINKS: CVMS PROVIDER PORTAL

CVMS PROVIDER PORTAL 101

CVMS PROVIDER PORTAL Reports User Guide

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## STEP 7: Receive & Manage Inventories of the Vaccine

Users designated as a "Healthcare Location Manager" in the CVMS PROVIDER PORTAL will have the ability to receive and process their COVID-19 Vaccine inventories through the system.

If you are responsible for multiple locations within your organization, you will be able to switch locations within the CVMS PROVIDER PORTAL to view and manage vaccine inventories for each of your locations.

It is important to maintain accurate COVID-19 Vaccine inventory levels for the location(s) that you support to remain in alignment with the CDC's COVID-19 Vaccine guidelines.

Once a COVID-19 Vaccine Inventory shipment is on its way,
a vaccine shipment record will be available for you to review in your shipments tab.

You will also receive an email notification when a Vaccine inventory shipment is on its way to your location.
- At the top of your home page, locate the Shipments tab
- Click Shipments
- After clicking Shipments, you will be directed to the Shipments page

You will see a List view on your page. To see all your Shipment Records, you will have to switch to the All Shipment Records list view. You will be able to switch back and forth between list views.

On the Shipment record, you will be able to review details about your expected order. On the Shipment record, click on the Details tab.

Primary Vaccine Coordinators will be notified via email from Pfizer or McKesson (Moderna) if a vaccine shipment has been processed for location(s) they support.

**Please reference the user guides in the Links section, for detailed instructions on how to complete the following actions relating to your vaccine inventories:**

### Adding COVID-19 Vaccine Inventory

When you physically receive a COVID-19 vaccine inventory shipment, you will want to add the inventory to your location's overall COVID-19 Vaccine inventory. Processing your COVID-19 Vaccine shipments correctly will ensure that your COVID-19 Vaccine levels are accurate for your reporting.

### Receiving an Inbound Vaccine Transfer

If you are receiving an inbound transfer from another location, you will want to review the inbound transfer page to stay up-to-date. When you receive the inbound transfer, you will be able to process the inventory via the inbound transfer page.

### Updating Vaccine Records

You will be able to update the vaccine inventory record. It will be very important to ensure accurate data entry when processing a new COVID-19 Vaccine inventory shipment.

### Redistribution

The planned and scheduled movement of inventory between two enrolled sites within the same organization with an approved redistribution agreement.

### Transfer

The unplanned and unscheduled movement of inventory between two enrolled sites (move inventory between those who have vaccine to those who do not).

LINKS: Receiving and Processing Vaccine Shipments User Guide

Inventory Deprecation, Transfer and Distribution User Guide

Accounting for Extra Doses in the Vaccine Inventory Job Aid

Updating Total inventory Dose Quantities Job Aid

CVMS PROVIDER PORTAL Reports User Guide

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## STEP 8: Invite Recipients to Register

Complete the Recipient Bulk Upload Template by entering the following information in the template:
- Employee/Recipient First Name
- Employee/Recipient Last Name
- Employee/Recipient Email Address

### Submitting the Recipient Bulk Upload Template:

Upload the completed Recipient Bulk Upload File by navigating to the Bulk Registration tab in the CVMS PROVIDER PORTAL.

View uploaded recipient records for completeness and accuracy. If you find errors or missing information, click cancel to remove the file and edit.

If the data is correct, click Create Records.

Once upload is complete, you will receive an alert message stating the number of successful employee/recipient uploads and the number of failed.

**Once you click OK, the successful uploads will receive an automatic email notification with instructions on how to complete their account setup and register in the COVID VACCINE PORTAL.**

If any employees or individual Recipients included in your upload failed, you will automatically receive an email with the attachment that contains the failed records and the reason for failure.

For recipients without an email address or unwilling to divulge one, they will be able to conduct registration on-site to receive the vaccine.

Correct the errors in the same file based on the failure reason and re-upload the file in the Bulk Registration tab.

LINKS: Recipient Bulk Upload User Guide

Recipient Bulk Upload Template

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## STEP 9: Check-In Recipients and Document Vaccination

*1) Search for Recipient in CVMS Provider Portal*

**Search for the Recipient by their name, DOB or email address.**

If a Recipient is already registered in CVMS you will be able to locate their record and view their information: **Priority Tier, Eligibility Status and Vaccine Dose Status**.

If errors were flagged on the registered Recipient's health questionnaire or it is incomplete, correct them with the Recipient's help. (Note: Only a Healthcare Location Manager profile can update a Recipient's registration data.)

**If you encounter one of the following scenarios** while searching for a Recipient in CVMS, proceed to step 1a to complete the Point of Care registration.
- Recipient was not located in the system
- Recipient was invited, but has not completed registration
- Recipient completed their first dose vaccination at a Long-term Care Facility and was not logged or registered in CVMS

*1a) Point of Care Process for Unregistered Recipients*

A designated person will need to create a Recipient record within the CVMS Provider Portal for the unregistered Recipient. On the Recipient tab, click Create New Recipient and enter in the Recipient's personal information including their email address.

For Recipients with a mobile phone and email address
- Once the personal information has been submitted in the CVMS Provider Portal, the Recipient will receive an automated email inviting them to complete their registration via the mobile friendly CVMS Provider Portal.

For Recipients without access to a mobile phone or an email address
- Go to the Help & Information tab and download the COVID-19 Recipient Vaccination (Health) Questionnaire.pdf
- Print out the full questionnaire for the recipient to physically complete. The designated person will then need to carefully enter the results from the printout into the CVMS Provider Portal.

**Complete this process with the recipient present. If something is entered incorrectly, you will need to have a Healthcare Location Manager update the Recipient's registration information, or have the Recipient make the change via the CVMS Recipient Portal. submit a ServiceNow ticket for any record updates. Please validate your inputs before submitting the recipient record.**

*2) Confirm Recipient Identity & Vaccine Eligibility*

Confirm registered Recipient is eligible to receive the vaccine by validating their priority and eligibility status as listed in CVMS.

**Note: The HCP can use discretion to administer a COVID-19 vaccine to a Recipient with a "Not Approved" eligibility status.**

**The HCP can determine if a Recipient falls under a currently eligible Priority Tier group and proceed with vaccination (in accordance with the CDC and NCDHHS prioritization of COVID-19 vaccine recipients).**

The State of North Carolina does not require proof of identity to proceed with vaccine. ID checking is up to the location and/ or facility protocols.

*3) HCP Locates Recipient Record Receives Verbal Consent*

The administering HCP searches for Recipient in CVMS Provider Portal by their name, DOB or email address.

**HCP reads vaccine health disclaimers to Recipient who will give verbal consent** that they authorize to receive COVID-19 vaccination.

**HCP records they have received the Recipient's verbal consent** in CVMS.

*4) HCP Administers COVID-19 Vaccine*

HCP administers vaccine and captures key details in CVMS:
- Injection site
- Dose (first or second)
- Route (intramuscular (IM) or subcutaneous (SQ))
- Date/time of dose
- Vial Barcode
- Vaccine product
- Vaccine Inventory
- Recipient notes (if applicable)
- On behalf of (Clinician) (if applicable)

Please review information for correctness before submitting.

CVMS Automatic Notifications

Recipients will receive **TWO** second dosage reminder notifications:
* **First Reminder: 24-HOURS** after first dosage
* **Second Reminder: ONE WEEK** after first dosage

Recipients will receive a physical proof of vaccination card and can also view a digital proof of vaccination via the CVMS Recipient Portal.

**Emails from @vaccineInfo:** Communications will be shared regarding CVMS enhancement updates, planned outages, training event invitations and information about new user guides and video demonstrations.

*5) HCP Reviews Post-Vaccine Reminders with Recipient*

At the end of the appointment, the HCP will:
* Print out and provide the CDC COVID-19 Vaccination Record from CVMS
* Review V-Safe information
* Share timing requirements for second dosage
* Schedule 2nd dose appointment

**Recipients can view their vaccination status and re-print their vaccine card in the CVMS Provider Portal** by going to My dashboard > Vaccine Record.

LINKS: Vaccine Administration User Guide